

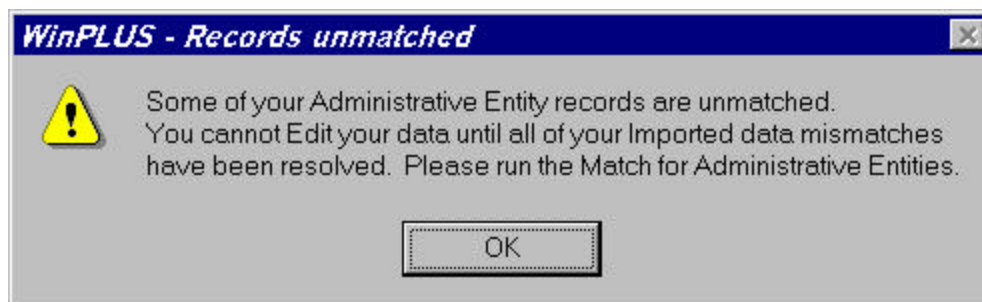
5.3 Match (Used with Imported Data Only)

The 'Match' feature, used with imported data only, follows the 'Read and Validate' import routine. Please note the following:

- ?? The Match processes is designed as a separate routine from Import. This lets you complete the Import operation even if you cannot immediately resolve all Match questions. Also, you do not need to complete the Match routine in one session. If you did not run the matching routine at the completion of importing your data, you must run it via the 'Match' option on the Main Menu. *Please note: You must complete the Match before proceeding with any other WinPLUS operations.*
- ?? The 'Match' option on the Main Menu will not run if: (1) you did not import your data (i.e., you performed direct data entry), or (2) your data were not imported successfully. In either case, you will receive the following message if you select the 'Match' option on the Main Menu:



- ?? The 'Edit Checks (Current Year and Historical)' option on the Main Menu will not run if you imported data but did not run the matching routine. If you try to run the edit checks, you will receive a message prompting you to run the "Match" feature:



- ?? If you select the 'Match' option from the Main Menu, you will be prompted to begin matching on administrative entities (A) or outlets (O). **To complete the matching process, you must match on administrative entities (A) and on outlets (O).**

The 'Match' feature consists of four steps:

1. Key information (e.g., NAME, LIB ID#, etc.) from the prior-year data is compared to the import data to match as many records as possible;
2. WinPLUS records official name and address changes;
3. WinPLUS runs the 'Structure Change' routine to resolve any records on the import file that have not been matched to the prior-year file; and
4. WinPLUS allows deletion of records on the prior-year file not found on the import file.

Once records are matched, they are moved to the administrative entity or outlet data base.

5.3.1 Matching Routine

This routine attempts to match records from the current-year import file against records from the prior-year file. WinPLUS completes two types of matches, an automatic match and a conditional match. The following examples show the routine only for the administrative entity file, but the outlet file routine works the same way.

There are two criteria for an automatic match:

1. WinPLUS checks records to see if the LIB ID# and NAME (of library) on the import file exactly match the data on the prior-year file. If both match, the records are considered an automatic match and the FSCS ID# is used.
2. If WinPLUS can match the library record to only one of these two key data elements, the matching routine also attempts to match any **two** of the following additional data elements: ADDRESS, CITY, ZIP or PHONE. If this condition is met, the record is considered an automatic match.

A match on only **one** of the six data elements described above constitutes a conditional match.

The data matching action and criteria for an automatic or conditional match are summarized below:

DATA MATCHING ACTION	LIB ID#	NAME (of Library)	ADDRESS, CITY, ZIP, PHONE
Automatic Match	Yes	Yes	None
	Yes	No	Any 2 of the 4
	No	Yes	Any 2 of the 4
Conditional Match (i.e., prompts user for match)	Yes	No	None or any 1 of the 4
	No	Yes	None or any 1 of the 4
	No	No	Any 1 of the 4

In a conditional match, WinPLUS displays both data records on a 'split-screen' and prompts the user to confirm whether there is a specific library record match. In the following example, the LIB ID# and only one of the other four variables match, so this is a conditional match. (Note: The FSCS ID# is not displayed on the current-year side of the data matching screen, as it is considered premature to include it on the current-year record at this point.)

The screenshot shows the 'WinPLUS - Match' dialog box with the title 'DATA MATCHING - ADMINISTRATIVE ENTITY'. It is divided into two columns: 'Prior Year Data' and 'Current Year Data'. The 'Prior Year Data' column contains fields for LIB ID # (002), FSCS ID # (WY0001), NAME (ALBANY COUNTY LIBRARY SYSTEM), ADDRESS (310 SOUTH 8TH ST), CITY (LARAMIE), ZIP 1 (82070), ZIP 2 (3969), and PHONE ((307)-721-2580). The 'Current Year Data' column contains fields for LIB ID # (002), NAME (ALBANY LIBRARY SYSTEM), ADDRESS (310 SOUTH ST), CITY (LIBRARY), ZIP 1 (82050), ZIP 2 (2222), and PHONE ((307)-721-2580). A smaller 'Import Conditional Match' dialog box is overlaid on top, asking 'Matched on field: LIBID' and 'Are these two records for the same library (Y/N)?'. It has 'OK' and 'Cancel' buttons. The 'Y' key is shown being pressed in the input field.

After a conditional match is found, the user types 'Y' to accept the match or 'N' to reject it. The record is then updated with the new information and WinPLUS moves on to the next record. Select 'Cancel Import' to return to the WinPLUS Main Menu.

Be especially careful when importing data for new libraries that are really structure changes. For example, if two library systems merge and the administrative entity keeps the address of one of the old systems, WinPLUS may read this as a conditional match between the new entity on the import file and the old entity on the prior-year record.

Please note: The data matching routine is **not** case sensitive. For example, a library name entered in upper-case letters (e.g., 'MAIN LIBRARY') will be successfully matched with a library name entered in lower-case letters (e.g., 'Main Library').

Before continuing to the next record, WinPLUS checks for name and address changes from the prior-year record to the import record just matched (whether an automatic or conditional match).

5.3.2 Checking for Name and Address Changes

While in the Data Matching routine, WinPLUS automatically checks for name and/or address changes so that the change can be tracked in the historical file if appropriate.

Name (of library) Change - When a user updates a name in an import record, the 'Import Name Change' window is automatically displayed below the split screen showing the import and prior-year data.

WinPLUS - Match Wyoming FY-2001

DATA MATCHING - ADMINISTRATIVE ENTITY

Prior Year Data

LIB ID #: 003 FSCS ID #: WY0002

NAME: CAMPBELL COUNTY PUBLIC LIBRARY

ADDRESS: 2101 4-J ROAD

CITY: GILLETTE

ZIP 1: 82718 ZIP 2: 5205

PHONE: (307)-687-0009

Current Year Data

LIB ID #: 003

NAME: CAMPBELL PUBLIC LIBRARY

ADDRESS: 2101 4-J ROAD

CITY: GILLETTE

ZIP 1: 82718 ZIP 2: 5205

PHONE: (307)-687-0009

Import Name Change

1. Was an official name change made to this import record? OK

2. Was a data entry error fixed on this import record? Cancel

3. Is the original data correct? 2

- ?? Type '1', then 'OK' to select "Was an official name change made to this import record?" when the library name was officially changed.
- ?? The user is prompted "Is this a Structure Change (Y/N)? ". Type 'N' to simply track the name change in the historical changes database. Type 'Y' to confirm that the record will need a structure change.
- ?? Type '2', then 'OK' to select "Was a data entry error fixed on this import record?" when a correction was made to the library name because of a data entry error.
- ?? Type '3', then 'OK' to select "Is the original data correct?" if you want to keep the original data.

WinPLUS then automatically checks for address changes for the same record.

Address Change - When the user updates an address in an import record, the 'Import Address Change' window is automatically displayed below the split screen showing the import and prior-year data. Select one of the three options displayed.

WinPLUS - Match Wyoming FY-2001

DATA MATCHING - ADMINISTRATIVE ENTITY

Prior Year Data		Current Year Data	
LIB ID #:	002	FSCS ID #:	WY0001
LIB ID #:	2		
NAME:	ALBANY COUNTY LIBRARY SYSTEM		
ADDRESS:	310 SOUTH 8TH ST		
CITY:	LARAMIE	CITY:	LIBRARY
ZIP 1:	82070	ZIP 2:	3969
ZIP 1:	82050	ZIP 2:	2222
PHONE:	(307)-721-2580		
PHONE:	(307)-781-2580		

Import Address Change

1. Was an official address change made to this import record?
2. Was a data entry error fixed on this import record?
3. Is the original data correct?

2

OK Cancel

- ?? Type '1', then 'OK' to select "Was an official address change made to this import record?" when the library address was officially changed.
- ?? The user is prompted "Is this a Structure Change (Y/N)?" Type 'N' to simply track the address change in the historical changes database. Type 'Y' to confirm that the record will need a structure change.
- ?? Type '2', then 'OK' to select "Was a data entry error fixed on this import record?" when a correction was made to the library address because of a data entry error.
- ?? Type '3', then 'OK' to select "Is the original data correct?" if you want to keep the original data.

After all matches are complete and name and address changes checked, WinPLUS begins the structure change routine.


5.3.3 Structure Change Routine

After all matches are complete and official name and address changes recorded, if one or more records from the administrative entity or outlet import file still is not matched to the previous year's file, WinPLUS automatically begins the structure change routine.

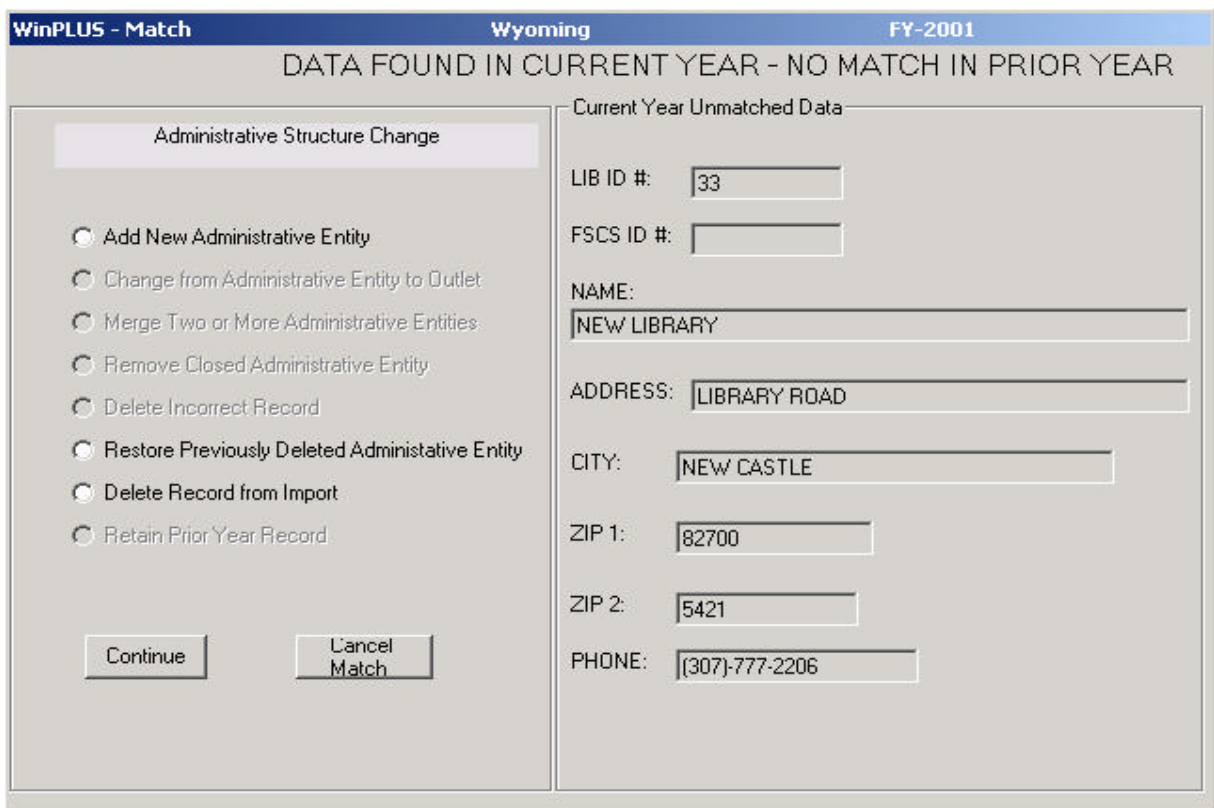
(Note: You cannot make more than nine structure changes during a single WinPLUS session. To make more than nine structure changes, 'Quit' and restart WinPLUS.)

Administrative Entity Structure Changes

A structure changes menu with several options is automatically displayed if one or more records from the administrative entity import file is not matched to the prior-year file. These options will vary depending on the type of match found. They are described below.


 **Add New Administrative Entity.** This is used to add a new administrative entity record.

WinPLUS assigns the new record a new FSCS ID#.

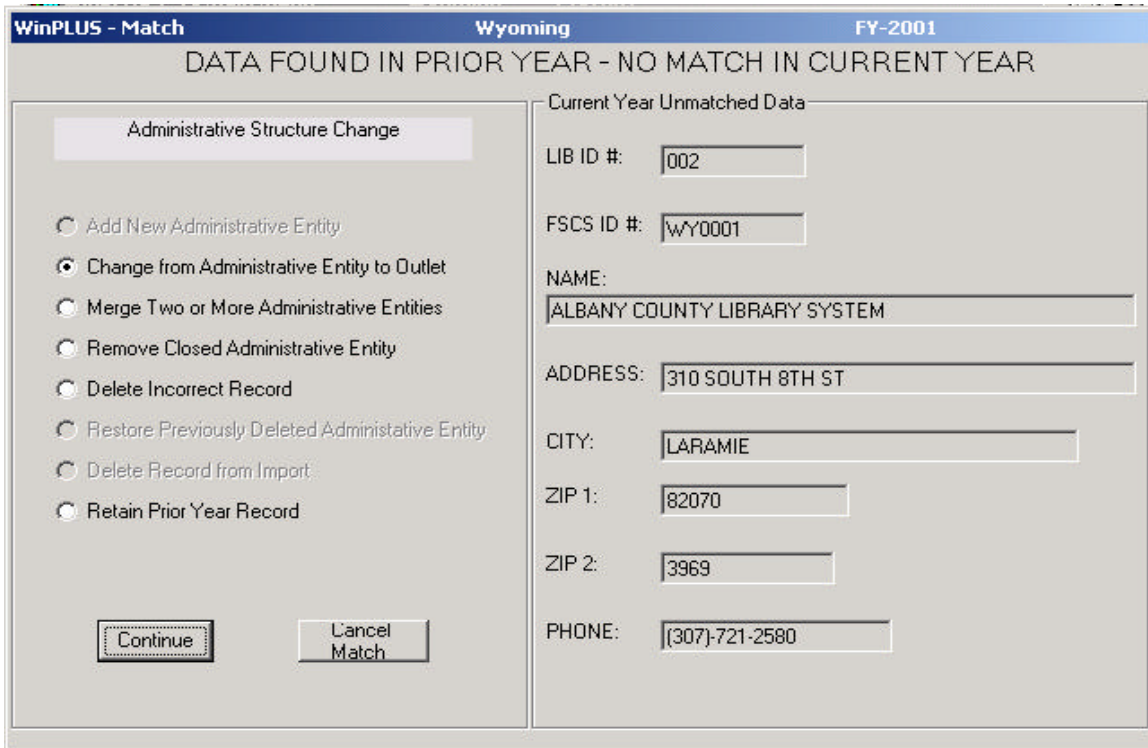


The image shows a screenshot of the 'WinPLUS - Match' dialog box. The title bar indicates 'Wyoming' and 'FY-2001'. The main heading is 'DATA FOUND IN CURRENT YEAR - NO MATCH IN PRIOR YEAR'. On the left, under 'Administrative Structure Change', there is a list of radio button options: 'Add New Administrative Entity' (selected), 'Change from Administrative Entity to Outlet', 'Merge Two or More Administrative Entities', 'Remove Closed Administrative Entity', 'Delete Incorrect Record', 'Restore Previously Deleted Administrative Entity', 'Delete Record from Import', and 'Retain Prior Year Record'. At the bottom left are 'Continue' and 'Cancel Match' buttons. On the right, under 'Current Year Unmatched Data', there are input fields for: 'LIB ID #' (33), 'FSCS ID #' (empty), 'NAME' (NEW LIBRARY), 'ADDRESS' (LIBRARY ROAD), 'CITY' (NEW CASTLE), 'ZIP 1' (82700), 'ZIP 2' (5421), and 'PHONE' ((307)-777-2206).

Select 'Add New Administrative Entity' from the 'Administrative Structure Changes' menu during the import matching routine, and then select 'Continue'. The program assigns the new entity a new FSCS ID# and automatically continues to process the next structure change.

 **Change from Administrative Entity to Outlet.** This is a new outlet created when an administrative entity becomes an outlet of another administrative entity.

(Note: The administrative entity that changed to an outlet is tracked in the historical database under its original FSCS ID#, followed by the new outlet's FSCS ID#.)



WinPLUS - Match Wyoming FY-2001

DATA FOUND IN PRIOR YEAR - NO MATCH IN CURRENT YEAR

Administrative Structure Change

- ☐ Add New Administrative Entity
- ☒ Change from Administrative Entity to Outlet
- ☐ Merge Two or More Administrative Entities
- ☐ Remove Closed Administrative Entity
- ☐ Delete Incorrect Record
- ☐ Restore Previously Deleted Administrative Entity
- ☐ Delete Record from Import
- ☐ Retain Prior Year Record

Continue Cancel Match

Current Year Unmatched Data

LIB ID #: 002

FSCS ID #: WY0001

NAME: ALBANY COUNTY LIBRARY SYSTEM

ADDRESS: 310 SOUTH 8TH ST

CITY: LARAMIE

ZIP 1: 82070

ZIP 2: 3969

PHONE: (307)-721-2580

Select 'Change from Administrative Entity to Outlet' from the 'Administrative Structure Change' menu during the import matching routine, and then select 'Continue'. You will receive the following message 'Change this Entity to an Outlet?'

WinPLUS - Administrative Structure Changes Wyoming FY-2001

Change Administrative Entity to an Outlet

Identification

01 LIBID: 002 02 Name: ALBANY COUNTY LIBRARY SYSTEM

Street Address Mailing Address

03 Address: 310 SOUTH 8TH ST 3M Address: 310 SOUTH 8TH ST

04 City: LARAMIE 4M City: LARAMIE

05 Zip: 82070 06 Zip4: 3 6M Zip4: 3969

4A County: ALBANY COUNTY

7A InterLib. Rel.: 7B Legal Basis: 7C SCS: 7E FTE Staff:

08 Population of the Legal Service Area: -2

Service Outlets

09 Number of Centrals: -2

10 Number of Branches: -2

11 Number of Bookmobiles: -2

13 ALA-MLS: -2.00

14 Total Librarians: -2.00

15 All Other Paid Staff: -2.00

16 Total Paid Employees: -2.00

WinPLUS

Change This Entity to an Outlet?

Yes No

If you choose 'Yes' and there are no outlets for this administrative entity, the structure change will proceed. If you type 'No', the structure change is cancelled.

When outlets exist for the administrative entity selected to change to an outlet, the user is prompted with a message "Outlets exist! You must first delete all outlets associated with this Entity." Press 'OK' to continue.

WinPLUS - Administrative Structure Changes Wyoming FY-2001

Change Administrative Entity to an Outlet

Identification

01 LIBID: 002 02 Name: ALBANY COUNTY LIBRARY SYSTEM

Street Address Mailing Address

03 Address: 310 SOUTH 8TH ST 3M Address: 310 SOUTH 8TH ST

04 City: LARAMIE 04 City: LARAMIE

05 Zip: 82070 05 Zip: 82070

4A County: ALBANY 4A County: ALBANY

7A InterLib. Rel.: 7E 7E

Outlets exists...You must first delete all outlets associated with this Entity

OK

Population FTE Staff

08 Population of the Legal Service Area: -2 13 ALA-MLS: -2.00

Service Outlets

09 Number of Centrals: -2 14 Total Librarians: -2.00

10 Number of Branches: -2 15 All Other Paid Staff: -2.00

11 Number of Bookmobiles: -2 16 Total Paid Employees: -2.00

Note: If the administrative entity that is changing to an outlet itself has outlets, these must be reconciled before the administrative entity can become an outlet. This is because outlets must be attached to an administrative entity. If such outlets exist, the following prompt appears: "Outlets exist! You must first delete all outlets associated with this Entity." To reconcile the outlets, select WinPLUS Main Menu option 'Outlet Structure Changes' and follow instructions in section 5.7—Outlet Structure Changes. After all outlets have been deleted, try the import again.

When outlets do not exist or after all outlets have been reconciled, the user selects the administrative entity for the new outlet that has changed from an administrative entity. Next, another window lists all the administrative entities.

WinPLUS - Administrative Structure Changes Wyoming FY-2001

Change Administrative Entity to an Outlet

Select Administrative Entity(ies)

LIBID	LIBNAME	CITY	FSCSKEY
002	ALBANY COUNTY LIBRARY SYSTEM	LARAMIE	WY0001
003	CAMPBELL PUBLIC LIBRARY	GILLETTE	WY0002
005	FREMONT SYSTEM	LANDER	WY0003
007	LARAMIE COUNTY LIBRARY SYSTEM	CHEYENNE	WY0004
009	LIBRARY SYSTEM	CODY	WY0005
010	PLATTE COUNTY LIBRARY SYSTEM	WHEATLAND	WY0006

WinPLUS

Select an Administrative Entity to be the parent record for this Administrative Entity that you are changing to an Outlet

OK

019	123456789	SUNDANCE	WY0013
022	GOSHEN COUNTY LIBRARY	TORRINGTON	WY0014
023	HOT SPRINGS COUNTY LIBRARY	THERMOPOLIS	WY0015
024	JOHNSON COUNTY LIBRARY SYSTEM	BUFFALO	WY0016
025	LINCOLN COUNTY LIBRARY SYSTEM	KEMMERER	WY0017
026	NIOBRARA COUNTY LIBRARY	LUSK	WY0018
029	SUBLETTE COUNTY LIBRARY SYSTEM	PINEDALE	WY0019

Continue Cancel

Use the up arrow, down arrow, page up, and page down keys to scroll through the list of administrative entities. Select the administrative entity for the newly created outlet record (the record being imported). The user is prompted to finalize the change.

WinPLUS - Administrative Structure Changes Wyoming FY-2001

Change Administrative Entity to an Outlet

Select Administrative Entity(ies)

LIBID	LIBNAME	CITY	FSCSKEY
002	ALBANY COUNTY LIBRARY SYSTEM	LARAMIE	WY0001
003	CAMPBELL PUBLIC LIBRARY	GILLETTE	WY0002
005	FREMONT SYSTEM	LANDER	WY0003
007	LARAMIE COUNTY LIBRARY SYSTEM	CHEYENNE	WY0004
009	LIBRARY SYSTEM	CODY	WY0005
010	PLATTE COUNTY LIBRARY SYSTEM	WHEATLAND	WY0006
012	SHERIDAN COUNTY LIBRARY	SHERI	WY0007
013	SWEETWATER COUNTY LIBRARY SYSTEM	GREEN RIVER	WY0008
015	NATRONA COUNTY LIBRARY SYSTEM	CASPER	WY0009
016	BIG HORN COUNTY LIBRARY SYSTEM	BASIN	WY0010
017	CARBON COUNTY LIBRARY SYSTEM	RAWLINS	WY0011
018	CONVERSE COUNTY LIBRARY SYSTEM	DOUGLAS	WY0012
019	123456789	SUNDANCE	WY0013
022	GOSHEN COUNTY LIBRARY	TORRINGTON	WY0014
023	HOT SPRINGS COUNTY LIBRARY	THERMOPOLIS	WY0015
024	JOHNSON COUNTY LIBRARY SYSTEM	BUFFALO	WY0016
025	LINCOLN COUNTY LIBRARY SYSTEM	KEMMERER	WY0017
026	NIOBRARA COUNTY LIBRARY	LUSK	WY0018
029	SUBLETTE COUNTY LIBRARY SYSTEM	PINEDALE	WY0019


Continue Cancel

Select 'Cancel' to cancel the change, cancel the current structure change record from the import and return to processing structure changes. Select 'Continue' to finalize the change. After the administrative entity record has been converted to an outlet, you will receive a message reminding you that you must edit the record to report data for the following fields: Outlet Type, Metropolitan Status Code, and Number of Bookmobiles. Select 'OK'.

WinPLUS

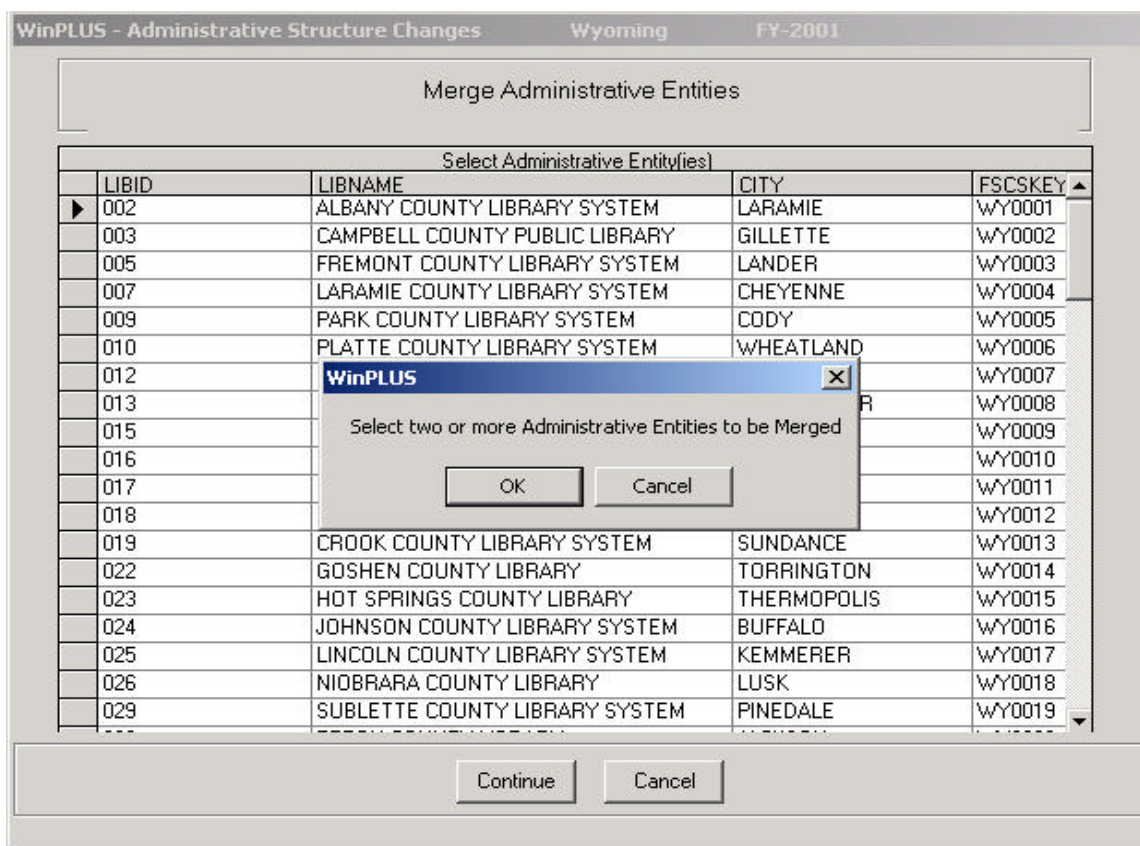
Administrative Record has been converted to an Outlet
You must edit record to report data for the following fields:
Outlet Type, MSA and number of bookmobiles

OK

 **Merge Two or More Administrative Entities.** This is a new administrative entity created when two or more administrative entities merge.

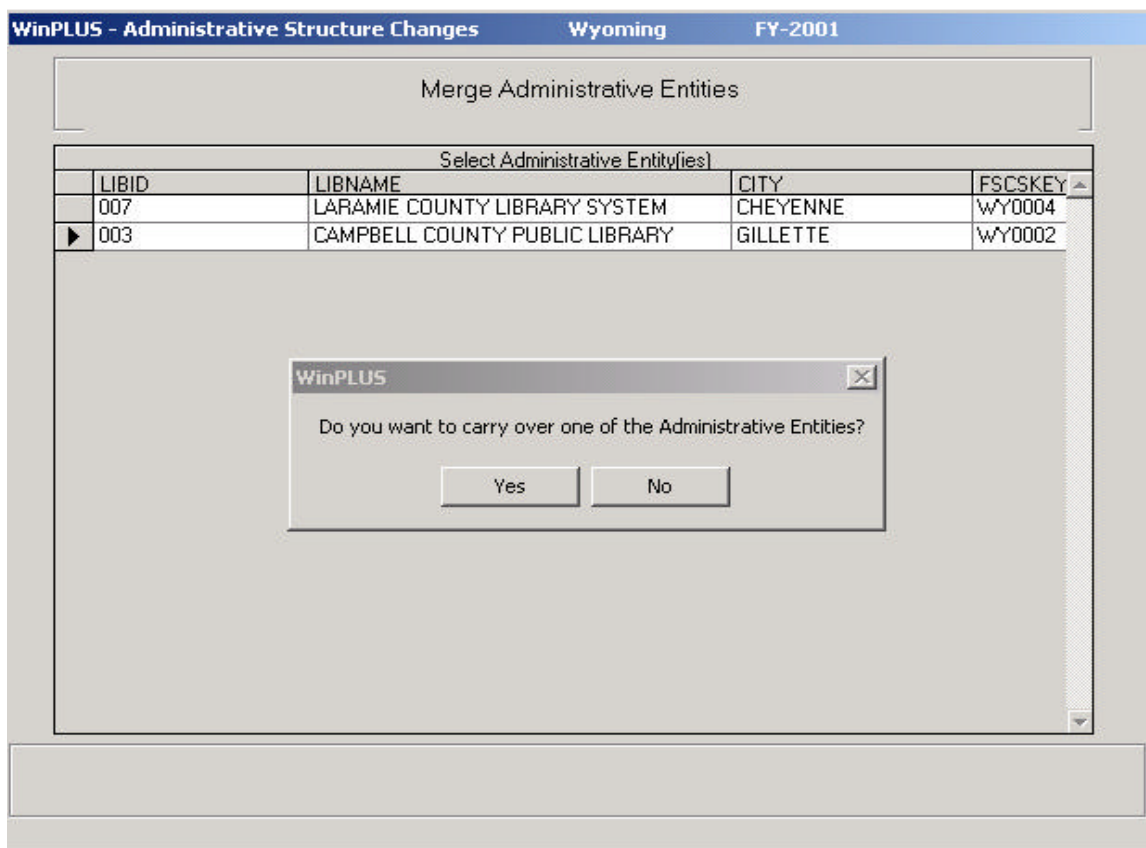
(Note: WinPLUS automatically assigns the new administrative entity a new FSCS ID#. All branches, bookmobiles and centrals are carried over to the new administrative entity record. The old administrative entities that merged are in the historical database under both their new and old FSCS ID#s.)

Select 'Merge Two or More Administrative Entities' from the 'Administrative Structure Change' menu during the import matching routine, and then select 'Continue'. A window lists all administrative entities.



Select the administrative entity records that are merging. Use the up arrow, down arrow, page up, and page down keys to scroll through the list of administrative entities. Select the administrative entities that you wish to merge by clicking on the gray box to the left of the names while holding down the **Ctrl** (Control) key. *The entire row must be highlighted.* Select 'Cancel' to return to the WinPLUS Main Menu, or select 'Continue' to proceed with the Structure Change.

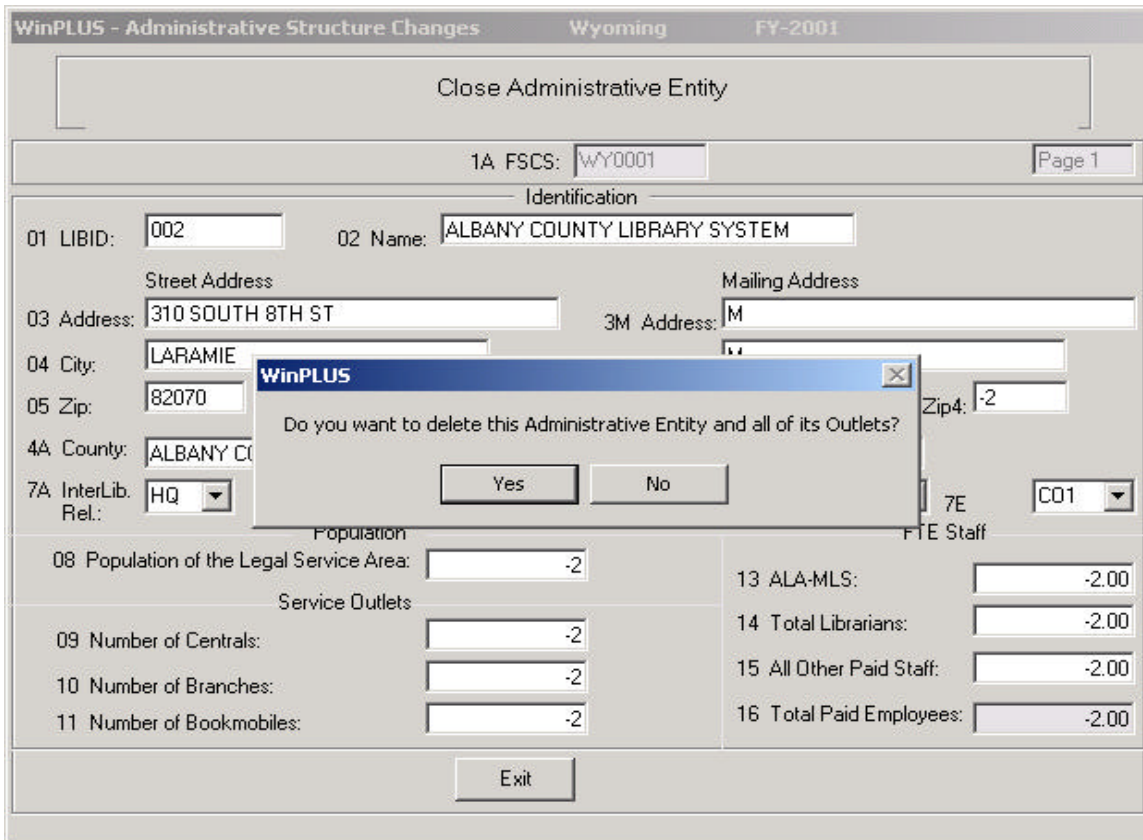
The next screen will ask, 'Do you want to carry over one of the Administrative Entities?' Choose 'Yes' to carry over data elements 1 through 7D from one of the administrative entities to the new merged administrative entity. Choose 'No' to enter new information for all data elements.



If you chose 'Yes', you will be prompted to 'Select Administrative Entity to carryover'. Highlight your selection and choose 'Continue' to proceed or 'Cancel' to cancel the merger. If you continue, the new administrative entity data screens will be displayed for your review. Note: The outlets from the old administrative entities are carried over to the newly merged administrative entity record.

Remove Closed Administrative Entity

To remove a closed administrative entity record from the current-year file, choose 'Remove Closed Administrative Entity' from the 'Administrative Structure Change' menu during the import matching routine, and then select 'Continue'. You will be asked, 'Do you want to delete this Administrative Entity and all of its Outlets?'



WinPLUS - Administrative Structure Changes Wyoming FY-2001

Close Administrative Entity

1A FSCS: WY0001 Page 1

Identification

01 LIBID: 002 02 Name: ALBANY COUNTY LIBRARY SYSTEM

Street Address Mailing Address

03 Address: 310 SOUTH 8TH ST 3M Address: M

04 City: LARAMIE

05 Zip: 82070 Zip4: -2

4A County: ALBANY CO

7A InterLib. Rel.: HQ 7E C01

Do you want to delete this Administrative Entity and all of its Outlets?

Yes No

Population

08 Population of the Legal Service Area: -2

Service Outlets

09 Number of Centrals: -2

10 Number of Branches: -2

11 Number of Bookmobiles: -2

FTE Staff

13 ALA-MLS: -2.00

14 Total Librarians: -2.00

15 All Other Paid Staff: -2.00

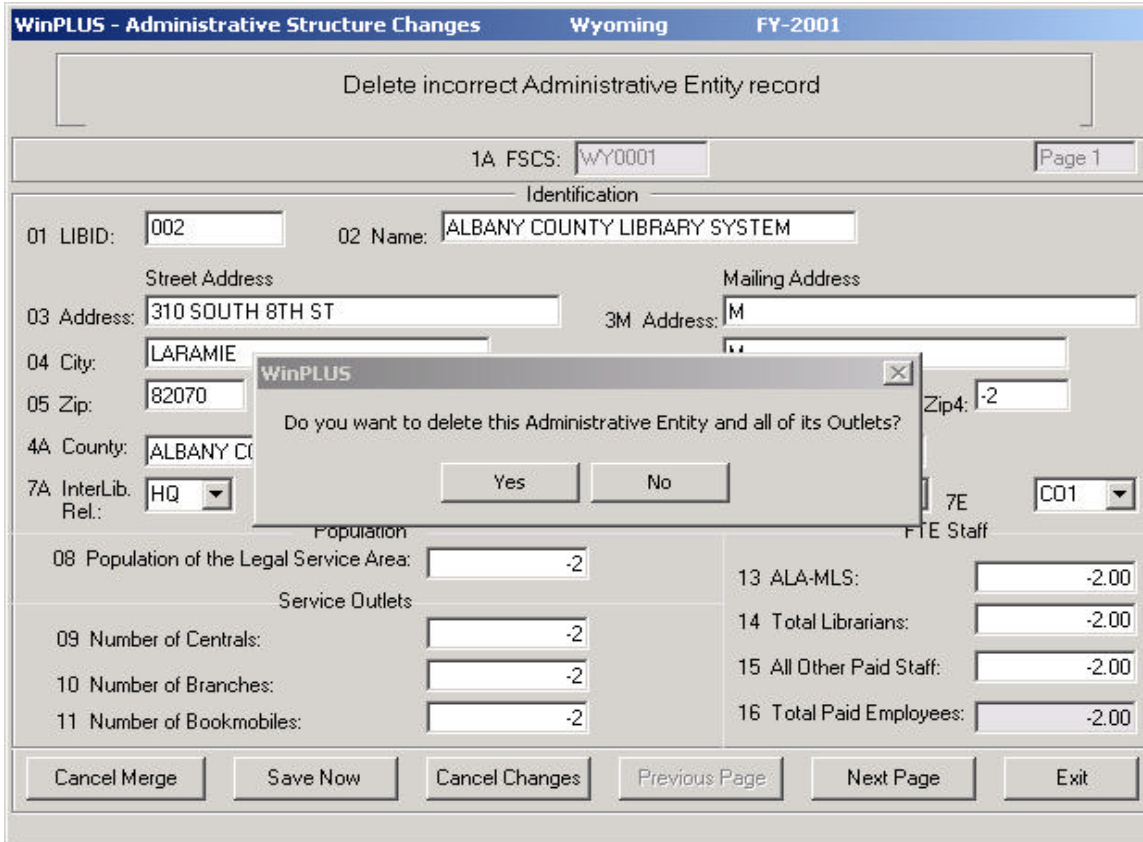
16 Total Paid Employees: -2.00

Exit

Choose 'No' to cancel, 'Yes' to delete. (Note: The closed administrative entity record is deleted from the administrative entity file, but the record is automatically tracked in the historical database under its original FSCS ID# and can later be restored. See section 5.6.7—Restore Previous Deletion).

Delete Incorrect Record

To delete an incorrect administrative entity, select 'Delete Incorrect Record' from the 'Administrative Structure Change' menu during the import matching routine, and then choose 'Continue'. You will be asked, 'Do you want to delete this Administrative Entity and all of its Outlets?'



WinPLUS - Administrative Structure Changes Wyoming FY-2001

Delete incorrect Administrative Entity record

1A FSCS: WY0001 Page 1

Identification

01 LIBID: 002 02 Name: ALBANY COUNTY LIBRARY SYSTEM

Street Address Mailing Address

03 Address: 310 SOUTH 8TH ST 3M Address: M

04 City: LARAMIE Zip4: -2

05 Zip: 82070

4A County: ALBANY CO 7E C01

7A InterLib. Rel.: HQ

Population FTE Staff

08 Population of the Legal Service Area: -2 13 ALA-MLS: -2.00

Service Outlets

09 Number of Centrals: -2 14 Total Librarians: -2.00

10 Number of Branches: -2 15 All Other Paid Staff: -2.00

11 Number of Bookmobiles: -2 16 Total Paid Employees: -2.00

Cancel Merge Save Now Cancel Changes Previous Page Next Page Exit

Do you want to delete this Administrative Entity and all of its Outlets?

Yes No

Choose 'Yes' to delete, 'No' to cancel. If you choose 'Yes', you will receive the message 'Delete completed'. (Note: The deleted administrative entity is automatically tracked in the historical database under its original FSCS ID# and can later be restored. See the next section.)

Restore Previously Deleted Administrative Entity.

When an administrative entity record has previously been deleted using WinPLUS, it can be restored from the historical database and become a current record in the administrative entity database under its original FSCS ID#.

Select 'Restore Previously Deleted Administrative Entity' from the 'Administrative Structure Change' menu during the import matching routine, and then choose 'Continue'. The 'Restore Administrative Entity Record' window is displayed.

Select an Administrative to Restore			
FSCS	LIBID	LIBNAME	CITY
WY0023	033	WESTON COUNTY LIBRARY SY	NEWCASTLE
WY0001	002	ALBANY COUNTY LIBRARY SY	LARAMIE
WY0002	003	CAMPBELL COUNTY PUBLIC LI	GILLETTE
WY0010	016	BIG HORN COUNTY LIBRARY S	BASIN
WY0006	010	PLATTE COUNTY LIBRARY SY	WHEATLAND
WY0009	015	NATRONA COUNTY LIBRARY S	CASPER

Select the administrative entity records that are being restored. Use the up arrow, down arrow, page up, and page down keys to scroll through the list of administrative entities. Select the administrative entities that you wish to restore by clicking on the gray box to the left of the names. *The entire row must be highlighted, and you must hold down the Ctrl (Control) key to select more than one entity.*

Select 'Cancel' to cancel the restore and return to the WinPLUS Main Menu, or select 'Restore' to proceed with the Structure Change. If you select 'Restore', the administrative entity record is restored from the historical database and becomes part of the current database under its original FSCS ID#.

✎✎Delete Record from Import.

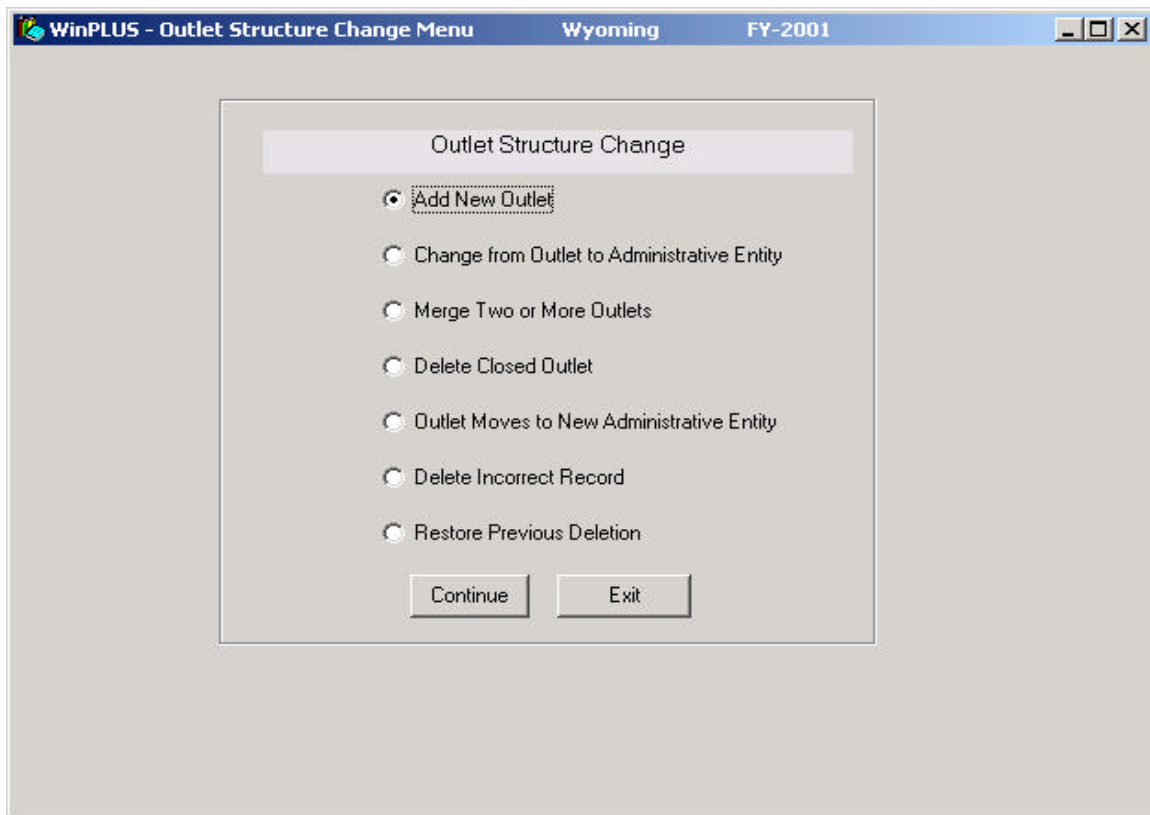
This option allows the user to 'bail out' of importing a record that does not match the user's FY 2001 template file. Canceling a record from import allows the import to proceed, but the original record is still in the import file. The user must edit the record, make a structure change, or correct an error. Otherwise the user will have to cancel the same record each time an import is performed. Select 'Delete Record from Import' from the 'Administrative Structure Change' menu during the import matching routine, and then choose 'Continue' to 'bail out' of importing a record. The program will automatically resume processing the next import file structure change.


✎✎Retain Prior-Year Record.

This option allows the user to retain the prior-year data when a prior-year record is not matched on the current-year import file. Select 'Retain Prior Year Record' from the 'Administrative Structure Change' menu during the import matching routine, and then choose 'Continue' to retain the prior-year record. The program will automatically resume processing the next import file structure change.

Outlet Structure Changes

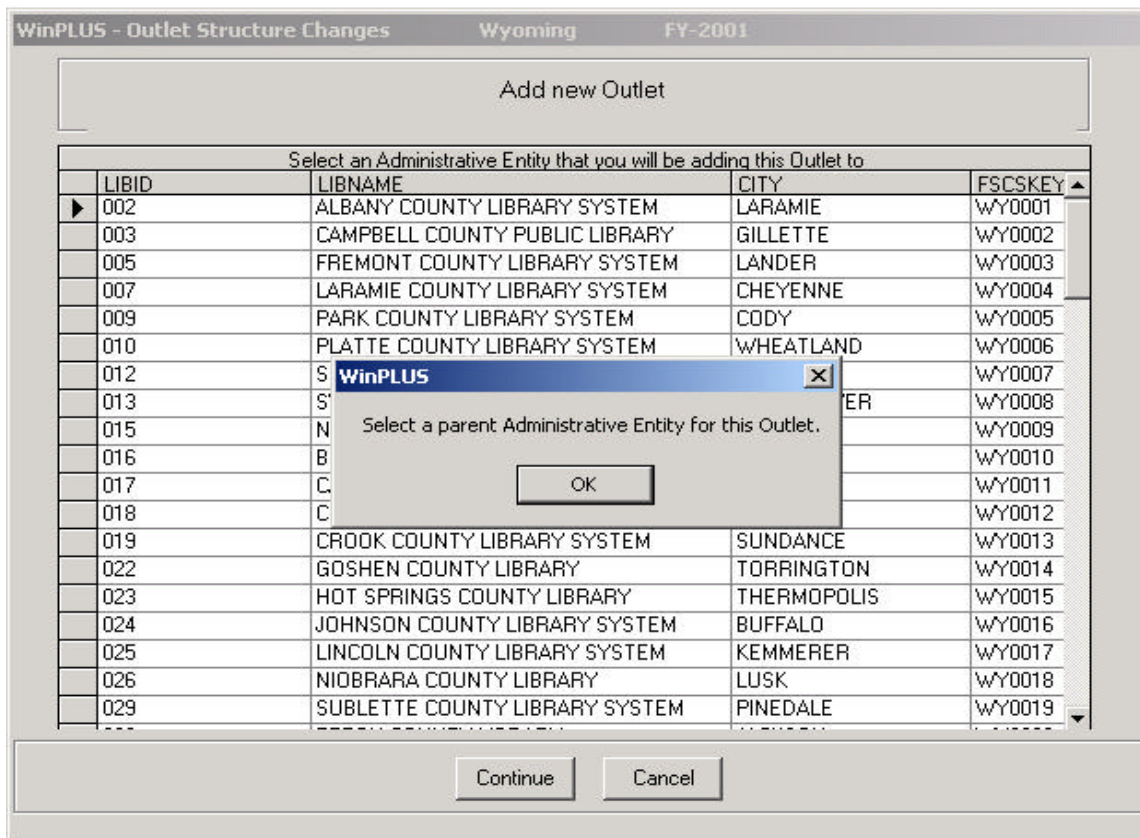
A structure changes menu with several options is automatically displayed if one or more records from the outlet import file is not matched to the prior-year file. These options vary depending on the type of match found. The options are described below. An example of the screen shown when data are found in the current-year import file but not in the prior-year file is shown below.



 **Add New Outlet.** This is used to add a new outlet record.

WinPLUS assigns the new outlet an FSCS ID#. The number assigned is the same as the administrative entity to which the outlet will be added, with the addition of a three-digit suffix to uniquely identify the new outlet.

Choose 'Add New Outlet' from the 'Outlet Structure Change Menu' during the import matching routine, and then choose 'Continue'. A window prompts the user for the administrative entity to which the outlet is being added.



The dialog box is titled "WinPLUS - Outlet Structure Changes" with sub-titles "Wyoming" and "FY-2001". The main heading is "Add new Outlet". Below this is a table with the caption "Select an Administrative Entity that you will be adding this Outlet to". The table has four columns: LIBID, LIBNAME, CITY, and FSCSKEY. A list of administrative entities is shown, with row 012 highlighted. A small "WinPLUS" error dialog box is overlaid on the table, with the message "Select a parent Administrative Entity for this Outlet." and an "OK" button.

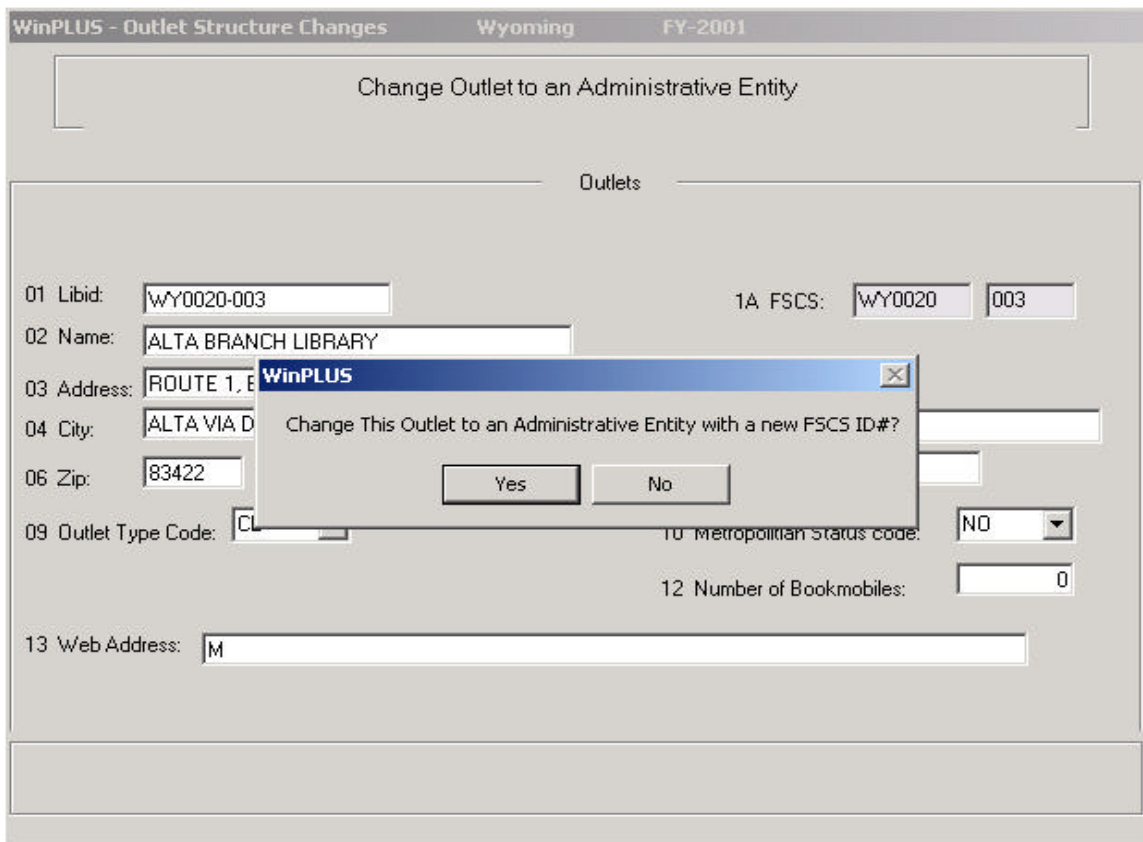
LIBID	LIBNAME	CITY	FSCSKEY
002	ALBANY COUNTY LIBRARY SYSTEM	LARAMIE	WY0001
003	CAMPBELL COUNTY PUBLIC LIBRARY	GILLETTE	WY0002
005	FREMONT COUNTY LIBRARY SYSTEM	LANDER	WY0003
007	LARAMIE COUNTY LIBRARY SYSTEM	CHEYENNE	WY0004
009	PARK COUNTY LIBRARY SYSTEM	CODY	WY0005
010	PLATTE COUNTY LIBRARY SYSTEM	WHEATLAND	WY0006
012	S		WY0007
013	S		WY0008
015	N		WY0009
016	B		WY0010
017	C		WY0011
018	C		WY0012
019	CROOK COUNTY LIBRARY SYSTEM	SUNDANCE	WY0013
022	GOSHEN COUNTY LIBRARY	TORRINGTON	WY0014
023	HOT SPRINGS COUNTY LIBRARY	THERMOPOLIS	WY0015
024	JOHNSON COUNTY LIBRARY SYSTEM	BUFFALO	WY0016
025	LINCOLN COUNTY LIBRARY SYSTEM	KEMMERER	WY0017
026	NIOBRARA COUNTY LIBRARY	LUSK	WY0018
029	SUBLETTE COUNTY LIBRARY SYSTEM	PINEDALE	WY0019

Select the administrative entity to which the outlet will be assigned. Use the up arrow, down arrow, page up, and page down keys to scroll through the list of administrative entities. Select the administrative entity that will be that will be the parent by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Select 'Cancel' to return to the import data matching screen, or select 'Continue' to proceed with the Structure Change.

 **Change from Outlet to Administrative Entity.** An outlet becomes an administrative entity.

(Note: The new administrative entity is assigned a new FSCS ID#. The old outlet is tracked in the historical outlet file under both its old FSCS ID# and the new administrative entity's FSCS ID#.)

Select 'Change from Outlet to Administrative Entity' from the 'Outlet Structure Change Menu' during the import matching routine, and then choose 'Continue'. You will receive the message 'Change this Outlet to an Administrative Entity with a new FSCS ID# ?'



WinPLUS - Outlet Structure Changes Wyoming FY-2001

Change Outlet to an Administrative Entity

Outlets

01 Libid: WY0020-003 1A FSCS: WY0020 003

02 Name: ALTA BRANCH LIBRARY

03 Address: ROUTE 1, E

04 City: ALTA VIA D

06 Zip: 83422

09 Outlet Type Code: CL

10 Metropolitan status code: NO

12 Number of Bookmobiles: 0

13 Web Address: M

Change This Outlet to an Administrative Entity with a new FSCS ID#?

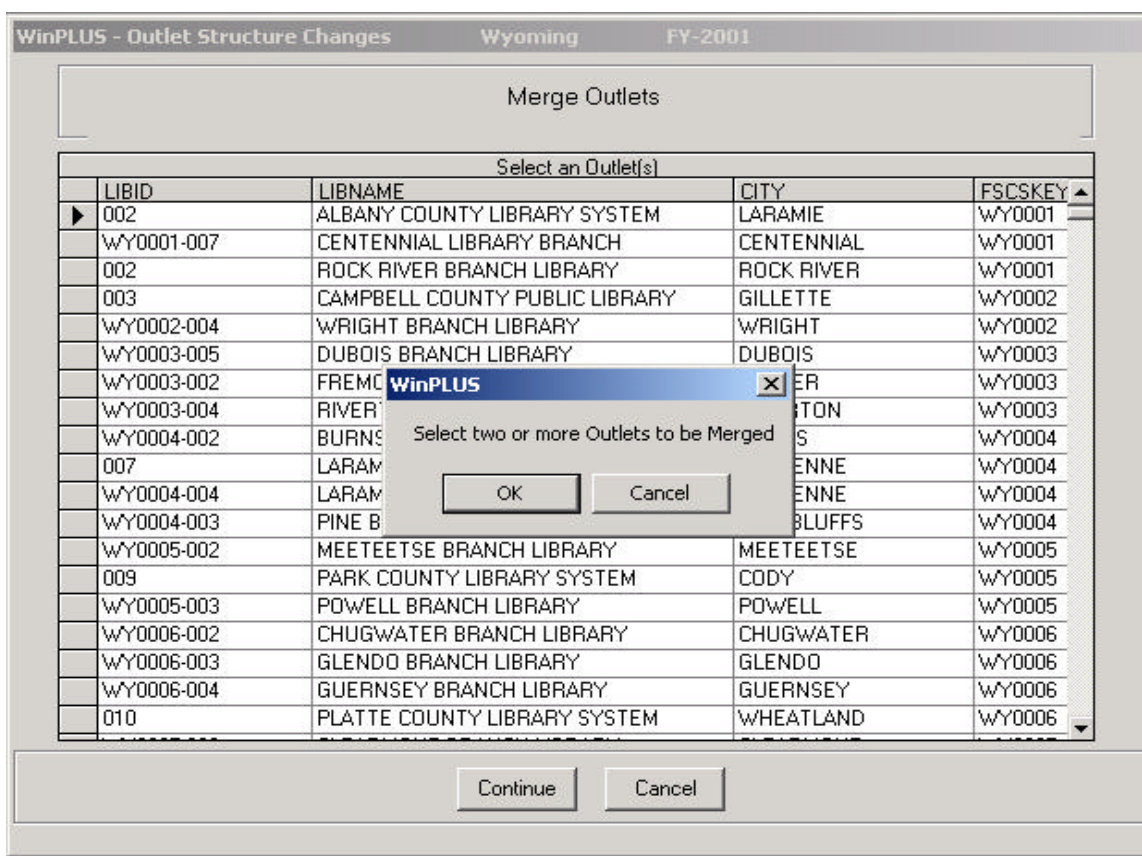
Yes No

Select 'Yes' to finalize the structure change, select 'No' to cancel the structure change and return to the data matching screen. If you select 'Yes', the data entry screens for the new administrative entity are displayed for your review and editing. You can still cancel the outlet-to entity change from these screens, if desired (see buttons at screen bottom).

 **Merge Two or More Outlets.** This is a new outlet created when two or more outlets merge.

(Note: WinPLUS automatically assigns the new outlet a new FSCS ID#. The old outlets that merged are tracked in the historical database under both their new and old FSCS ID#s).

Select 'Merge Two or More Outlets' from the 'Outlet Structure Change Menu' during the import matching routine, and then choose 'Continue'. A window lists all the outlets. You will receive the message 'Select two or more Outlets to be Merged'. Select 'OK' to continue.



Select the outlet records that are being merged. Use the up arrow, down arrow, page up, and page down keys to scroll through the list of outlets. Select the outlets that you wish to merge by clicking on the gray box to the left of the names. Use the CTRL key to select the second record. *The entire row must be highlighted.*

WinPLUS - Outlet Structure Changes Wyoming FY-2001

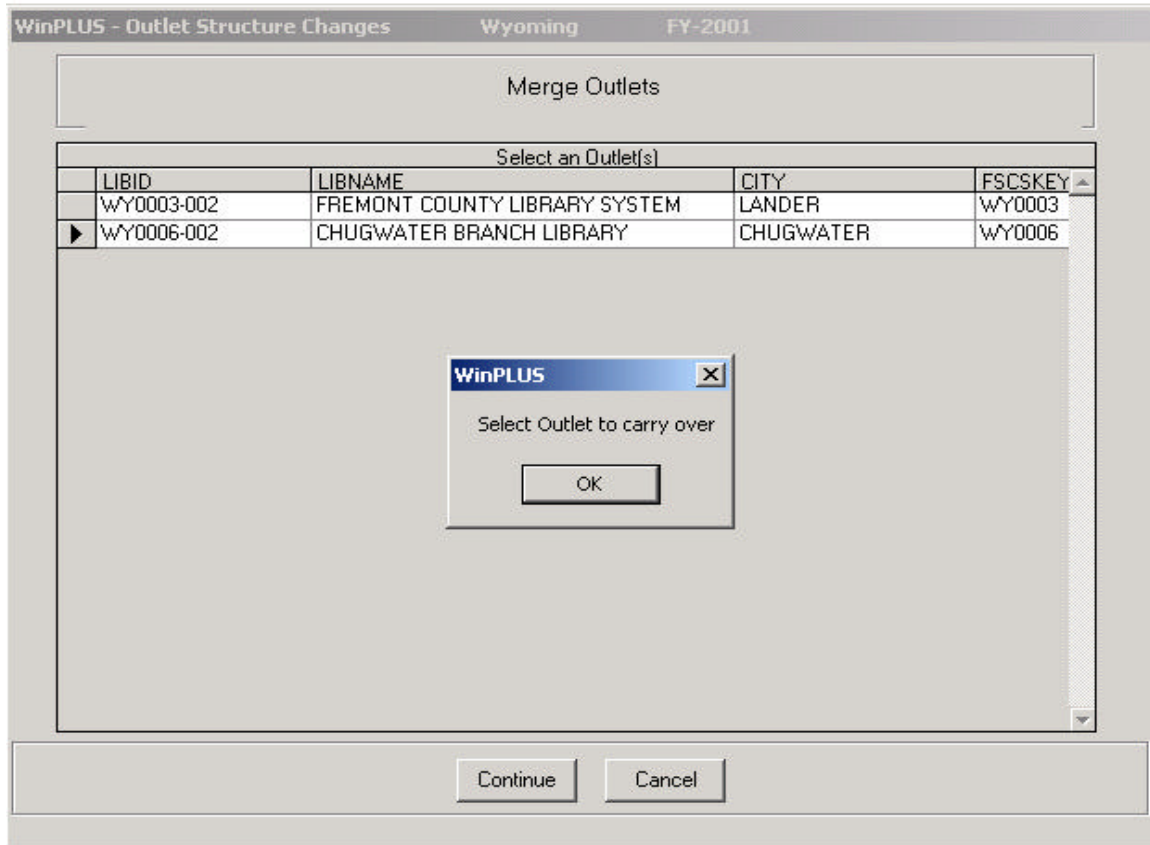
Merge Outlets

Select an Outlet(s)

LIBID	LIBNAME	CITY	FSCSKEY
002	ALBANY COUNTY LIBRARY SYSTEM	LARAMIE	WY0001
WY0001-007	CENTENNIAL LIBRARY BRANCH	CENTENNIAL	WY0001
002	ROCK RIVER BRANCH LIBRARY	ROCK RIVER	WY0001
003	CAMPBELL COUNTY PUBLIC LIBRARY	GILLETTE	WY0002
WY0002-004	WRIGHT BRANCH LIBRARY	WRIGHT	WY0002
WY0003-005	DUBOIS BRANCH LIBRARY	DUBOIS	WY0003
WY0003-002	FREMONT COUNTY LIBRARY SYSTEM	LANDER	WY0003
WY0003-004	RIVERTON BRANCH LIBRARY	RIVERTON	WY0003
WY0004-002	BURNS BRANCH LIBRARY	BURNS	WY0004
007	LARAMIE COUNTY LIBRARY SYSTEM	CHEYENNE	WY0004
WY0004-004	LARAMIE COUNTY LIBRARY SYSTEM - BOO	CHEYENNE	WY0004
WY0004-003	PINE BLUFFS BRANCH LIBRARY	PINE BLUFFS	WY0004
WY0005-002	MEETEETSE BRANCH LIBRARY	MEETEETSE	WY0005
009	PARK COUNTY LIBRARY SYSTEM	CODY	WY0005
WY0005-003	POWELL BRANCH LIBRARY	POWELL	WY0005
WY0006-002	CHUGWATER BRANCH LIBRARY	CHUGWATER	WY0006
WY0006-003	GLENDO BRANCH LIBRARY	GLENDO	WY0006
WY0006-004	GUERNSEY BRANCH LIBRARY	GUERNSEY	WY0006
010	PLATTE COUNTY LIBRARY SYSTEM	WHEATLAND	WY0006

Continue Cancel

Select 'Continue' to proceed with the merge or 'Cancel' to cancel the current outlet structure change from the import and return to the 'Outlet Structure Change Menu'. If you select 'Continue', you will see the message 'Do you want to carryover one of the Outlets?'



If you select 'Yes', the above screen will be displayed with the message 'Select the Outlet to carryover'. Select the outlets that you wish to carry over by clicking on the gray box to the left of the names. *The entire row must be highlighted.*

WinPLUS - Outlet Structure Changes Wyoming FY-2001

Merge Outlets

Select an Outlet(s)

LIBID	LIBNAME	CITY	FSCSKEY
WY0003-002	FREMONT COUNTY LIBRARY SYSTEM	LANDER	WY0003
WY0006-002	CHUGWATER BRANCH LIBRARY	CHUGWATER	WY0006

Continue Cancel

Select 'Continue' to proceed with the structure change. Information from this outlet will be inserted in the newly merged outlet.

You will then receive a screen with the message ‘Select a parent Administrative Entity for this Outlet’. Select the parent administrative entity by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Choose ‘Continue’ to proceed with the structure change.

WinPLUS - Outlet Structure Changes Wyoming FY-2001

Merge Outlets

Select an Administrative Entity that you will be adding this Outlet to

	LIBID	LIBNAME	CITY	FSCSKEY
▶	002	ALBANY COUNTY LIBRARY SYSTEM	LARAMIE	WY0001
	003	CAMPBELL COUNTY PUBLIC LIBRARY	GILLETTE	WY0002
	005	FREMONT COUNTY LIBRARY SYSTEM	LANDER	WY0003
	007	LARAMIE COUNTY LIBRARY SYSTEM	CHEYENNE	WY0004
	009	PARK COUNTY LIBRARY SYSTEM	CODY	WY0005
	010	PLATTE COUNTY LIBRARY SYSTEM	WHEATLAND	WY0006
	012	S		WY0007
	013	S	ER	WY0008
	015	N		WY0009
	016	B		WY0010
	017	C		WY0011
	018	C		WY0012
	019	CROOK COUNTY LIBRARY SYSTEM	SUNDANCE	WY0013
	022	GOSHEN COUNTY LIBRARY	TORRINGTON	WY0014
	023	HOT SPRINGS COUNTY LIBRARY	THERMOPOLIS	WY0015
	024	JOHNSON COUNTY LIBRARY SYSTEM	BUFFALO	WY0016
	025	LINCOLN COUNTY LIBRARY SYSTEM	KEMMERER	WY0017
	026	NIOBRARA COUNTY LIBRARY	LUSK	WY0018
	029	SUBLETTE COUNTY LIBRARY SYSTEM	PINEDALE	WY0019

WinPLUS

Select a parent Administrative Entity for this Outlet.

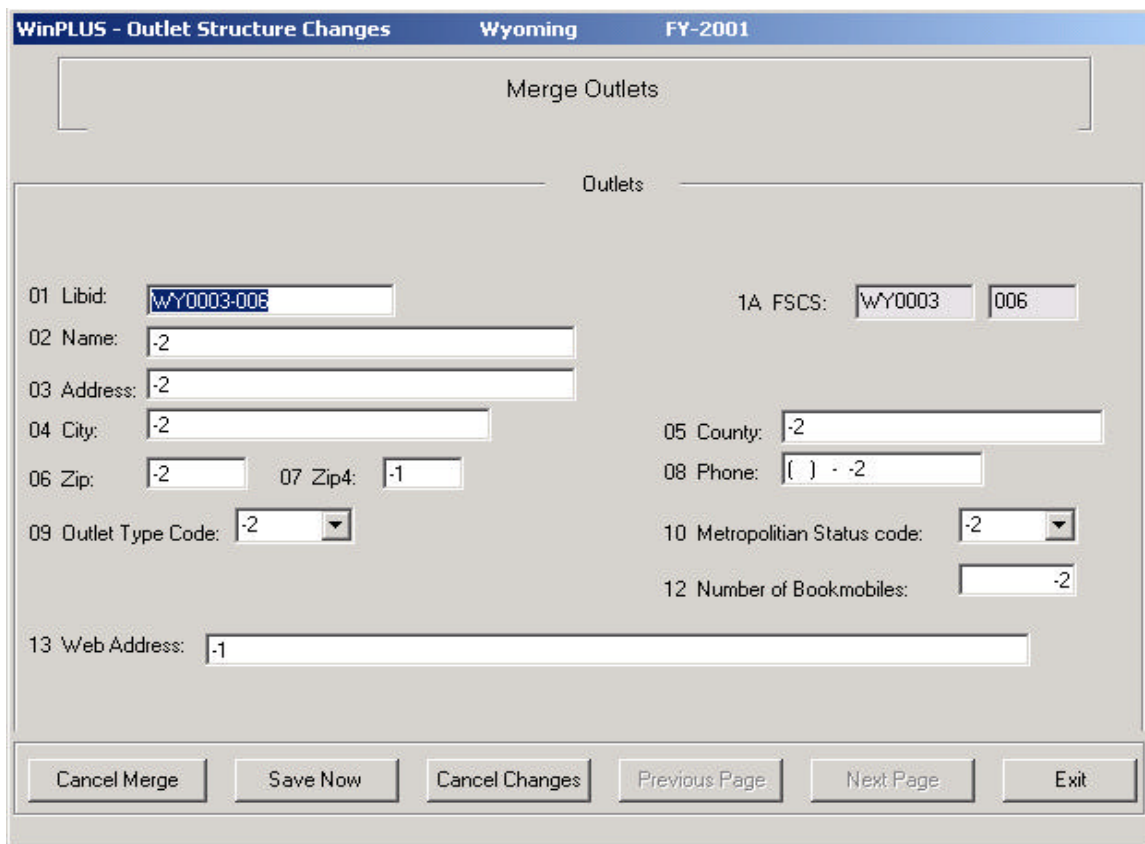
OK

Continue Cancel

If you choose to carry over one of the outlets, you will receive a screen with data for that outlet inserted. You will need to provide any missing data. When you exit, your change will be finalized.

WinPLUS - Outlet Structure Changes		Wyoming	FY-2001
Merge Outlets			
Outlets			
01 Libid:	<input type="text" value="WY0003-006"/>	1A FSCS:	<input type="text" value="WY0003"/> <input type="text" value="006"/>
02 Name:	<input type="text" value="FREMONT COUNTY LIBRARY SYSTEM"/>		
03 Address:	<input type="text" value="451 NORTH 2ND ST"/>		
04 City:	<input type="text" value="LANDER"/>	05 County:	<input type="text" value="FREMONT COUNTY"/>
06 Zip:	<input type="text" value="82520"/>	07 Zip4:	<input type="text" value="2316"/>
08 Phone:	<input type="text" value="(307)332-5194"/>		
09 Outlet Type Code:	<input type="text" value="BR"/>	10 Metropolitan Status code:	<input type="text" value="NO"/>
12 Number of Bookmobiles:	<input type="text" value="0"/>		
13 Web Address:	<input type="text" value="M"/>		
<input type="button" value="Cancel Merge"/> <input type="button" value="Save Now"/> <input type="button" value="Cancel Changes"/> <input type="button" value="Previous Page"/> <input type="button" value="Next Page"/> <input type="button" value="Exit"/>			

If you did not choose to carry over an outlet, you will receive the following screen after selecting a parent administrative entity.



The screenshot shows a software window titled "WinPLUS - Outlet Structure Changes" with a subtitle "Wyoming FY-2001". The main heading is "Merge Outlets". Below this is a section labeled "Outlets" containing various data entry fields. The fields are organized into two columns. The left column includes: 01 Libid (text box with "WY0003-006"), 02 Name (text box with "-2"), 03 Address (text box with "-2"), 04 City (text box with "-2"), 06 Zip (text box with "-2"), 07 Zip4 (text box with "-1"), 09 Outlet Type Code (dropdown menu with "-2"), and 13 Web Address (text box with "-1"). The right column includes: 1A FSCS (two text boxes with "WY0003" and "006"), 05 County (text box with "-2"), 08 Phone (text box with "() -2"), 10 Metropolitan Status code (dropdown menu with "-2"), and 12 Number of Bookmobiles (text box with "-2"). At the bottom of the window is a row of six buttons: "Cancel Merge", "Save Now", "Cancel Changes", "Previous Page", "Next Page", and "Exit".

Field ID	Field Name	Value
01	Libid	WY0003-006
02	Name	-2
03	Address	-2
04	City	-2
05	County	-2
06	Zip	-2
07	Zip4	-1
08	Phone	() -2
09	Outlet Type Code	-2
10	Metropolitan Status code	-2
11	1A FSCS	WY0003
12	Number of Bookmobiles	-2
13	Web Address	-1

You will need to add the missing data to complete the merge structure change.

Remove Closed Outlet.

To remove a closed outlet during import, select 'Remove Closed Outlet' from 'Outlet Structure Change Menu' during the import matching routine, and then choose 'Continue'.

The image shows a screenshot of the 'WinPLUS - Outlet Structure Changes' dialog box. The title bar indicates 'Wyoming' and 'FY-2001'. The main window is titled 'Close Outlet' and contains a section labeled 'Outlets'. The form fields are as follows:

- 01 Libid: WY0020-003
- 02 Name: ALTA BRANCH LIBRARY
- 03 Address: ROUTE 1, BOX 3480/MAIL-0
- 04 City: ALTA VIA DRIGGS
- 06 Zip: 83422
- 07 Zip4: 96
- 09 Outlet Type Code: BR
- 10 Metropolitan Status code: NO
- 12 Number of Bookmobiles: 0
- 13 Web Address: M
- 1A FSCS: WY0020 003
- TETON
- (307)353-2472

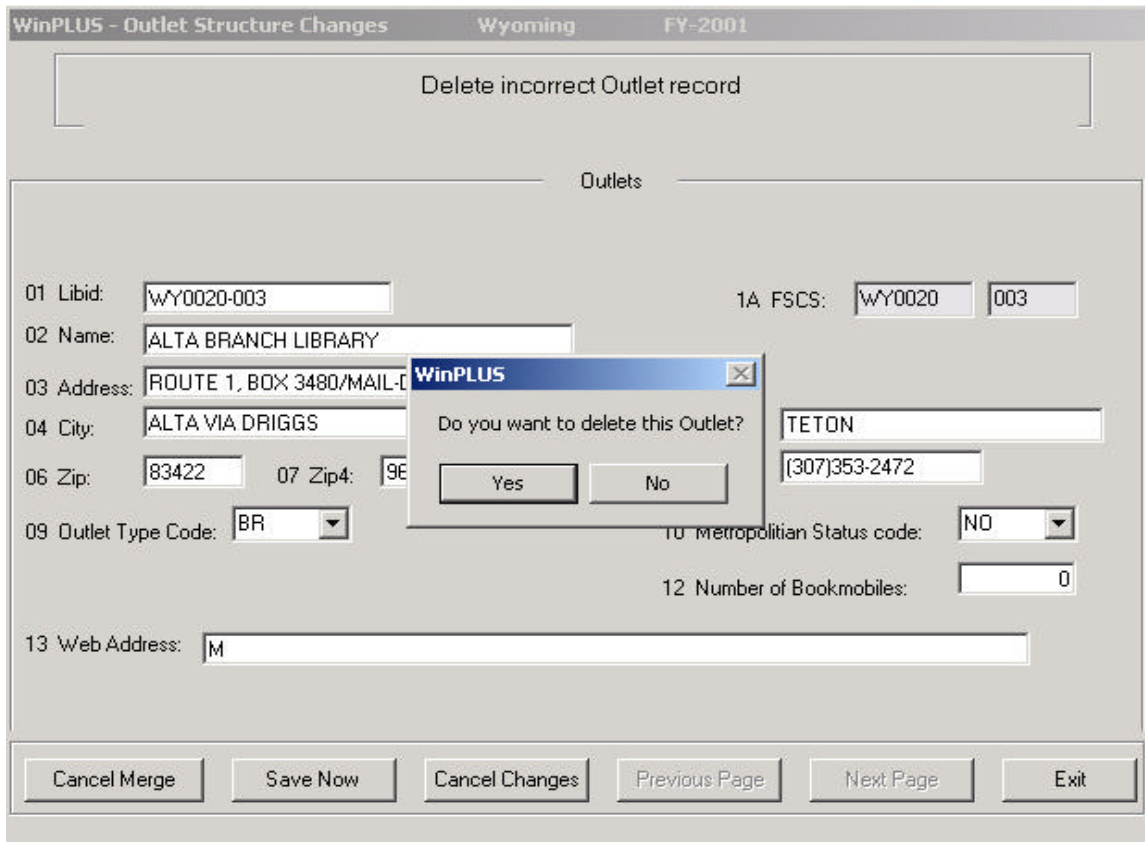
A small 'WinPLUS' dialog box is overlaid on the main form, asking 'Do you want to delete this Outlet?' with 'Yes' and 'No' buttons.

At the bottom of the main dialog box, there are buttons: 'Cancel Merge', 'Save Now', 'Cancel Changes', 'Previous Page', 'Next Page', and 'Exit'.

A 'Close Outlet' data entry screen will be displayed with the message 'Do you want to delete this Outlet?' If you choose 'Yes', you will receive the message 'Delete completed'. Select 'No' to cancel the change and return to the data matching screen. (Note: The closed outlet is tracked in the historical database and can later be restored. See section 5.7.8—Restore Previous Deletion.)

Delete Incorrect Record

To delete an incorrect outlet record during import, select 'Delete Incorrect Record' from the 'Outlet Structure Change Menu' during the import matching routine, and then choose 'Continue'.



WinPLUS - Outlet Structure Changes Wyoming FY-2001

Delete incorrect Outlet record

Outlets

01 Libid: WY0020-003 1A FSCS: WY0020 003

02 Name: ALTA BRANCH LIBRARY

03 Address: ROUTE 1, BOX 3480/MAIL-0

04 City: ALTA VIA DRIGGS

06 Zip: 83422 07 Zip4: 9E

09 Outlet Type Code: BR

10 Metropolitan Status code: NO

12 Number of Bookmobiles: 0

13 Web Address: M

Do you want to delete this Outlet?

Yes No

Cancel Merge Save Now Cancel Changes Previous Page Next Page Exit

A 'Delete incorrect Outlet record' data entry screen will be displayed with the message 'Do you want to delete this Outlet?' Choose 'Yes' to delete the outlet from the import, or 'No' to cancel. If you choose 'Yes', you will receive the message 'Delete completed'. (Note: The deleted outlet is tracked in the historical database under its original FSCS ID# and can later be restored. See next section.)

Restore Previously Deleted Outlet.

When an outlet record has been previously deleted, the record can be restored using this option. The deleted record is restored from the historical database and becomes a current record in the outlet database under its original FSCS ID#.

Select 'Restore Previously Deleted Outlet' from the 'Outlet Structure Change Menu' during the import matching routine, and then choose 'Continue'. The 'Restore Outlet Record' window is displayed.

Select an Outlet to Restore			
FSCS	LIBID	LIBNAME	CITY
WY0001	002	CENTENNIAL LIBRARY BRANC	CENTENNIAL
WY0011	WY0011-002	LITTLE SNAKE RIVER VALLEY	BAGGS
WY0007	WY0007-003	STORY BRANCH LIBRARY	STORY
WY0011	WY0011-006	MEDICINE BOW BRANCH LIBR	MEDICINE BOW
WY0013	WY0013-003	PINE HAVEN BRANCH LIBRARY	PINE HAVEN
WY0007	WY0007-007	SHERIDAN COUNTY LIBRAY (B	SHERIDAN
WY0002	WY0002-002	GEORGE AMOS MEMORIAL LIB	GILLETTE
WY0019	WY0019-003	BONDURANT BRANCH LIBRAR	BONDURANT
WY0002	WY0002-003	RECLUSE BRANCH LIBRARY	RECLUSE
WY0001	002	ALBANY COUNTY LIBRARY SYS	LARAMIE
WY0001	WY0001-007	CENTENNIAL LIBRARY BRANC	CENTENNIAL
WY0001	002	ROCK RIVER BRANCH LIBRAR	ROCK RIVER

Select the outlet record that is being restored. Use the up arrow, down arrow, page up, and page down keys to scroll through the list of outlets. Select the outlets that you wish to restore by clicking on the gray box to the left of the names. *The entire row must be highlighted.*

Select 'Cancel' to return to the WinPLUS Main Menu, or select 'Restore' to proceed with the Structure Change. If you select 'Restore', the outlet record is restored from the historical database and again becomes part of the outlet database under its original FSCS ID#.

✎✎Delete Record from Import.

This option allows the user to 'bail out' of importing a record that does not match the user's FY 2001 template file. When 'Delete Record from Import' is selected, the record is not imported into the file, but the original record is still in the import file. Select 'Delete Record from Import' from the 'Outlet Structure Change Menu' during the import matching routine, and then choose 'Continue' to 'bail out' of importing a record. The program will automatically resume processing the next import file structure change.

✎✎Retain Prior Year Record.

This option allows the user to keep the prior-year data for a record that is not matched on the current-year import file. Select 'Retain Prior Year Record' from the 'Outlet Structure Change Menu' during the import matching routine, and then choose 'Continue' to retain the prior-year record.

Note: Outlet Moves to a New Administrative Entity is not an option available during import. If you have an outlet that has moved to a new administrative entity, select WinPLUS Main Menu option 'Outlet Structure Changes', then select 'Outlet Moves to New Administrative Entity' and make the structure change before attempting to import data.

5.3.4 Reconcile Mismatched Records (Administrative Entity or Outlet)

This is the last step in the data matching routine, after all records have been matched, names and addresses checked, and appropriate structure changes entered. WinPLUS prepares a report of mismatched records (i.e., records that are on the prior-year file but are not on the current-year file). See following section 5.4—Report of Mismatched Record(s) for more information.

